



# Shield Insurance Analysis



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A background image showing a close-up of an insurance policy document. The words "INSURANCE POLICY" are printed in large, bold, serif capital letters. A silver metal clipboard is clipped to the top left corner of the document. A fountain pen lies horizontally across the lower right portion of the document. The text on the document is slightly blurred, but some words like "CONDITIONS", "your insurance needs", "are certain that you", "and protections", "in the taking after pages and", "would like to know almost your insurance", "claim. Please", "are beyond any doubt", "if you don't mind", "circumstances", and "are giving" are visible.

# Introduction

- Shield Insurance was found with a vision to provide comprehensive and innovative insurance solutions to individuals, families and businesses
- They have entrusted our team with the task of conducting a comprehensive analysis to evaluate the performance of their company
- The analysis is based on the data provided by Shield Insurance, covering the period from November 2022 to April 2023.

# Goals

01



Objective 01

ANALYZE CUSTOMER BASE AND  
REVENUE GENERATION

02



Objective 02

POLICY CHANGES MONITORING

03



Objective 03

TREND ANALYSIS OVER TIME

04



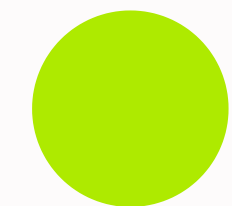
Objective 04

SALES MODE AND AGE GROUPS  
ANALYSIS



# Data Sets

1. dim\_customer
2. dim\_date
3. dim\_policies
4. fact\_premiums
5. fact\_settlements





# Dashboard



# Insights

# Insights



## Customer Base

- .....● The company serves **26,841 customers**, reflecting strong market presence.



## Revenue

- .....● Total revenue stands at **₹989.25 million**, showcasing robust performance.



## Regional Performance

- .....● **Delhi** leads with **11,007 customers** and ₹401.6 million revenue.

| Revenue Split |                 |               |
|---------------|-----------------|---------------|
| City          | Total Customers | Total Revenue |
| Delhi NCR     | 11007           | 401.6M        |
| Mumbai        | 6432            | 239.5M        |
| Hyderabad     | 4340            | 160.5M        |
| Chennai       | 2966            | 106.3M        |
| Indore        | 2096            | 81.3M         |
| Total         | 26841           | 989.3M        |





## Monthly Trends

.....● **March** saw an **85% revenue rise**, while **April** faced a **41.7% decline**.



## Sales Channels

.....● **Offline agents** drive 55.4% of customers and 55.6% of revenue.



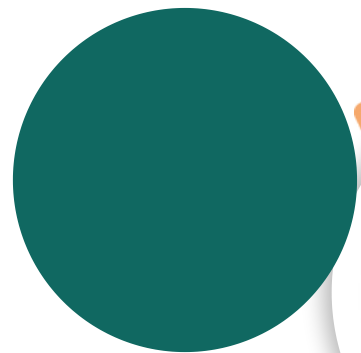
## Top Policies

.....● **POL4321HEL (4,434 customers)** and **POL3309HEL (3,829 customers)** are the most popular.



Policy Preference By Age Group

| policy_id  | 18-24 | 25-30 | 31-40 | 41-50 | 51-65 | 65+  | Total |
|------------|-------|-------|-------|-------|-------|------|-------|
| POL4321HEL | 1044  | 1175  | 1449  | 453   | 209   | 104  | 4434  |
| POL3309HEL | 276   | 490   | 1945  | 707   | 287   | 124  | 3829  |
| POL4331HEL | 455   | 661   | 1686  | 592   | 207   | 134  | 3735  |
| POL5319HEL | 109   | 318   | 1511  | 862   | 361   | 168  | 3329  |
| POL6303HEL | 110   | 249   | 1297  | 824   | 381   | 156  | 3017  |
| POL6093HEL | 95    | 197   | 1051  | 670   | 326   | 204  | 2543  |
| POL9221HEL | 71    | 123   | 864   | 558   | 419   | 283  | 2318  |
| POL2005HEL | 39    | 83    | 545   | 351   | 358   | 592  | 1968  |
| POL1048HEL | 40    | 111   | 629   | 340   | 244   | 304  | 1668  |
| Total      | 2239  | 3407  | 10977 | 5357  | 2792  | 2069 | 26841 |



## Customer Demographics

- .....● The **31-40** age group has **10,977 customers**, contributing **₹335.7 million** revenue.



## Age Group Insights

- .....● The 31-40 age group consistently dominates in customer count and revenue.

| Age Group | Total Customers | Total Revenue |
|-----------|-----------------|---------------|
| 31-40     | 10977           | 335.7M        |
| 41-50     | 5357            | 210.6M        |
| 65+       | 2069            | 193.8M        |
| 51-65     | 2792            | 156.9M        |
| 25-30     | 3407            | 61.5M         |
| 18-24     | 2239            | 30.7M         |
| Total     | 26841           | 989.3M        |

# Insights

## 1. Customer Base

- The company serves a substantial customer base of **26,841 individuals**, reflecting its strong market presence.

## 2. Revenue Highlights

- The total revenue generated stands at an impressive **₹989.25 million**, showcasing the company's robust financial performance.

## 3. Regional Performance

- Delhi is the top-performing region, with 11,007 customers contributing ₹401.6 million in revenue.
- This clearly establishes Delhi as a key market for both customer acquisition and revenue generation.

## 4. Customer Demographics

- The **31-40 years** age group represents the largest customer segment, with 11,455 customers, and also drives the highest revenue of ₹335.7 million.
- This shows the company's strong appeal among younger and middle-aged individuals.

## 5. Monthly Trends

- The month of **March** marked significant growth, with an **85% increase in revenue** and an **82% rise in customer numbers**, indicating a highly successful period.
- Conversely, **April experienced a sharp decline**, with revenue dropping by 41.7% and customer numbers decreasing by 41.4%, highlighting a need for focused improvement.

# Insights

## 6. Sales Channels

- The **offline agent channel remains the most effective**, accounting for 55.4% of customers and 55.6% of revenue.
- Other sales modes, such as online platforms, contribute relatively evenly, with revenue shares ranging between 12.6% and 15.6%.

## 7. Top Policies

- Policy ID: **POL4321HEL** is the most popular, with 4,434 customers.
- Policy ID: POL3309HEL follows closely, serving 3,829 customers.
- In both cases, the 31-40 years age group forms the majority of policyholders, reflecting their preference for these options.

## 8. Revenue Contribution by Policy

- Policy ID: POL2005HEL is a major revenue driver, generating ₹324.3 million, making it a standout performer among the company's offerings.

## 9. Age Group Insights

- Across all policies, the **31-40 years** age group consistently dominates in both customer numbers and revenue, solidifying its importance as a core demographic for the company.



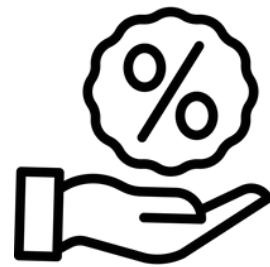
# Recommendations

# Recommendations



## Target Younger Demographics

The **18-24 age group** has fewer **customers** and generates less revenue. Focus on creating tailored products or **marketing strategies** to attract this segment.



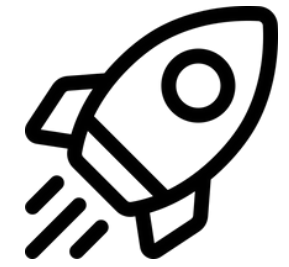
## Enhance Senior Offerings

The **65+ age** group is a significant contributor to the customer base and revenue. Introduce new policies or services specifically designed for their needs to further capitalize on this market.



## Expand Partnerships

Collaborate with healthcare providers, financial institutions, and other relevant businesses to reach more customers and offer exclusive discounts across different age groups.



## Boost Online Sales

Strengthen **online channels (app and website)** to increase customer acquisition and revenue in the digital space.

# THANK YOU

For watching this presentation



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